



OFFICE OF PUBLIC INSTRUCTION

PO BOX 202501
HELENA MT 59620-2501
www.opi.mt.gov
(406) 444-3095
(888) 231-9393
(406) 444-0169 (TTY)

Linda McCulloch
Superintendent

To: Authorized Representatives, Business Managers, and District Clerks

Re: ESEA/ NCLB Consolidated Application in E-Grants: Carryover Funds and Budget Amendment Procedures

PLEASE FORWARD THIS OFFICIAL EMAIL TO THE ESEA/NCLB DISTRICT CLERK OR BUSINESS OFFICIAL.

The FY07 ESEA/NCLB carryover funds have been loaded into the FY08 ESEA/NCLB Consolidated applications in E-Grants. Prime applicant (fiscal agent) districts for the ESEA/NCLB Consolidated application, need to click on the following link to review carryover funds.

<http://www.opi.mt.gov/pdf/schoolfinance/EseaNclbCarryover07.pdf>

To add these funds to your budgets, create an amendment to your ESEA/NCLB Consolidated application and allocate the total amount of your carryover into your budget(s) in accord with the appropriate purpose category(ies) and budget code(s).

Please note: The prime applicant district is responsible for submitting the amendment; member districts do not take any action. The person creating the amendment must read this complete set of instructions before creating and submitting an amendment.

INSTRUCTIONS FOR PRIME APPLICANTS TO AMEND CARRYOVER INTO THEIR ESEA/NCLB CONSOLIDATED APPLICATIONS

1. Login, using your user name and password into the E-Grants System
<http://www.opi.mt.gov/ITProjects/E-Grants.html>. This needs to be either the authorized representative or the person with data entry rights.
2. Under Formula Grants, click on ESEA/NCLB Consolidated.
3. Click on the radio button of the latest approved application or approved amendment, and click on the "Create Amendment" button. OR if an amendment has been created, but not submitted, click on the radio button for the amendment and open it.
4. Click the "Funding" tab: This will open the Allocations page. If any title program has carryover funds, the amount will be in the "Carryover" row under "Prior Year Funds."
5. SYSTEM applicants, must check the "Multi-District Transfer In" row for any Carryover increase that may have been added to the original amount on this row.

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Hint: Write down the title programs with a "carryover" amount to be used as a reference when making amendments in all appropriate pages.

Note 1: If you have exercised your REAP-flex (100%) option in the original application and choose to also REAP-flex your carryover funds to those receiving programs, you must transfer the carryover amounts on the Funding Allocations page. Once you have transferred the Carryover, you must click the "Calculate Totals" button and click the "Save Page" button.

Note 2: Districts not eligible for REAP-flex that may have exercised the option to transfer up to 50% of certain title program funds in the original application (general transferability) may not transfer any of their carryover amounts into other title programs.

Note 3: If you have any schoolwide programs in the district (or system) and transferred funds to the schoolwide budget in the original application, you must first go into Title I A Basic, Program Detail, and rework and recalculate and save "Targeting Step 4" (see special instructions below). Then adjust the amount to transfer to schoolwide on the "Allocations" page under the NCLB/ESEA "Funding" tab.

Note 4:

Be sure to use "Calculate Totals" and "Save Page" buttons on all modified pages.

SPECIAL INSTRUCTIONS FOR ESEA TITLE I, PART A

BEFORE any changes are made to the budget pages for Title I, it is necessary to recalculate the "Targeting Step 4" amounts. Here are the steps:

1. Click the "Page Lock Control" tab; check the "Expand All" check box. Next, check the boxes on the right side of the page to open these pages for editing: "Targeting Step 4", "Full Time Equivalent" and "Budget Detail". Click on "Save Page" button.
2. Click "Program Detail" tab
3. Click the "Targeting Step 4" tab.
4. On the upper portion of the page, revise any SET ASIDE amounts as appropriate, including Indirect Costs, if needed.

TIP: If you decide to add all of your carryover into the district set-asides (any appropriate for your system) it may simplify this process. If you previously set aside funds for Public School Choice Transportation and/or Supplemental Educational Services that are not needed, go ahead and move those to other set-asides or let those funds flow down to the school level.

1. On the upper left side of the page, press the "Calculate Distribution Amount" button and the "Distribute Amount Evenly" button.
2. At the bottom of the page check to see the "Attendance Center Allocation" "Difference" equals \$0. If it is within \$1 or \$2, make a change in the box for one of the Attendance Center Allocations and click the "Check Distribution" button and the "Difference" should now equal \$0.
3. Click "Save Distribution" button.
4. Now go to the "Budget" tab and the "Budget Detail" page.

5. Add appropriate amount of funds to the budget detail and click the "Save Page" button.

SCHOOLWIDE (SWP) BUDGET OPTION

If any Attendance Center(s) show as SWP, the public allocation amount for those schools must be transferred on the ESEA/NCLB Funding Allocations page and the Application Section for Title I A Schoolwide must be opened and the budget modified.

SPECIAL INSTRUCTIONS TO BUDGET INDIRECT COSTS

As a result of a carryover addition, districts have the option to adjust the budgeted Indirect Cost recovery.

1. Click the "Budget Pages" tab, which opens the Budget Detail page
2. The "Total Allocations Available for Budgeting (A)" at the bottom of the page, will include the carryover. You have the option to budget *up to* the "Maximum Indirect Cost (E)."
3. If you elect to adjust Indirect Costs, enter or edit an amount in the section (G) box.
4. Click "Calculate Totals" button.
5. Note: If you do not have an approved indirect cost rate and would like to have one, click on <http://www.opi.mt.gov/SchoolFinance/Acct2.html> for Indirect Cost Application and Information.

INSTRUCTIONS FOR PRIVATE/NONPUBLIC EQUITABLE SHARE

1. Click the "Page Lock Control" tab; check the "Expand All" check box. Next, click the "Private/Nonpublic Equitable Share" check box on the right side of the page to open the page for editing. Click on the "Save Page".
2. If carryover has been added for Titles IIA – VA, click the "Private/Nonpublic Equitable Share" tab. Next, click the "Calculate" button to redistribute the equitable share.
3. If an Indirect Cost adjustment has been made to any program, it is necessary to adjust the Private/Nonpublic Equitable Share calculation. Here are the steps:
 - a. Click the "Program Detail" tab, which opens the Private/Nonpublic Equitable Share page.
 - b. Correct Line 2.
 - c. Click the "Calculate Before Saving" button. Click on the "Save Page."

Follow the same instructions as stated above for amending Private/Nonpublic Equitable Share for other title programs.

INSTRUCTIONS FOR AMENDING THE BUDGETS

On the top right-hand side of the application page go to *Applications Sections* and click on the *arrow*:

1. Click on a title program for which you have carryover (i.e., Title I, Title IV, etc.)
2. Click the "Page Lock Control" tab; check the "Expand All" check box. Next, check the Budget Detail box on the right-hand side of the page to open the page for editing. Click on the "Save Page."
3. Click the "Budget Pages" tab.

4. Amend the “Budget Detail” page, using the appropriate purpose category(ies) and object codes, to include *all* of the carryover amount. The amount you must build into the budget shows at the bottom of the page under "Allocation Remaining (A-H)." (See the [Instruction](#) link for definitions of the purpose categories and object codes.)
5. Reminder: NO commas, dollar signs, or decimal points can be used on the budget sheet.
6. Click on "Calculate Totals" and "Save Page". Make certain the "Allocation Remaining (A-H)" field is zero.
7. Follow the same instructions as stated above for amending and saving budgets for all ESEA/NCLB programs that have carryover.

SPECIAL INSTRUCTIONS FOR TITLE V, PART A

1. Follow the above instructions for amending the budgets.
2. Note the updated amount of equitable services to private schools on Line 8.
3. Redistribute your allocation among the activities chosen for the public and private/nonpublic districts. Use the summary at the bottom of each page to guide you.
4. If you take indirect costs, do not remove the indirect costs from the distribution among activities. (An error in the E-Grants program forces you to budget your entire amount available for the Title V, Part A activities).

TO SUBMIT TO OPI

When the budget(s) have been amended and saved, the *Authorized Representative* will need to go to the “ESEA/NCLB Consolidated” section of the application, and click on the “Submit” tab. When the Submit tab opens, click on “Consistency Check”, wait until it's complete, then go to the bottom of the page and click on the “Submit to OPI” button.

If the consistency check results in errors, they must be corrected by returning to the program where the error originated, click the page lock control tab, Expand All, click the box that corresponds to the error to open it for editing, navigate to that page, correct it, and click on the "Save Page". Return to the “Submit” tab to re-run the Consistency Check. Repeat until the Consistency Check returns no errors.

Thank you for your work to complete the E-Grants amendment process. If you have questions regarding this memo, please call Kellee English, E-Grants Coordinator at 444-7841.

If you have program specific questions while creating an amendment, click on the blue “Contact Us” link found at the very bottom of every Web page within E-Grants. It will provide you with a list of OPI program contacts and fiscal contacts for each federal program in E-Grants.